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ABSTRACT

Retirement is recognized as a family experience, affecting retirees, their spouses, and their children. This study examined how the retirement transition affects the middle class, healthy, and financially secure male retiree and his wife. In-depth interviews were conducted with 92 couples from the Boston area in which the husband had been retired for 6 to 12 months. Responses from husbands and wives were classified as: (1) impingement; (2) the second look; (3) the spoiled retirement; and (4) retirement as resource. The response labeled "impingement" was almost entirely limited to the wives and refers to the overlap of husbands into the wife's sphere of activity. While most wives saw impingements as minor nuisances rather than as crises, both working and non-working women mentioned disruption of daily routines. Wives generally reported that they had adjusted unilaterally to the new situation. For husbands retirement afforded a "second look" at their wives' daily lives. Many were dismayed at their wives' humdrum routines and at the amount of time spent on housework. When illness made normal activities impossible or was life-threatening, the result was often a "spoiled retirement." Physical and emotional problems of other family members also sometimes resulted in spoiled retirement reponses. "Retirement as resource" refers to a global evaluation of retirement as a positive state, and was the modal response of the majority of respondents. Husbands' assessment of retirement focused on the personal level, while wives focused on the interpersonal realm. The findings suggest that most problems of adjustment were either minor and short-lived or attributable to conditions other than retirement itself. (NB)

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THE TRANSITION TO RETIREMENT: ACCOUNTS OF HUSBANDS AND WIVES

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Understanding of the retirement experience has increased since the not so distant past when it was assumed that retirement was largely an individual experience. There is now a general recognition that retirement is a family experience, affecting not only the individual retiring, but those in the close family circle--spouses and children. When the family is seen in terms of interacting and interdependent roles, it becomes obvious that change in the roles of one family member will affect others.

In this research, we have looked at how the retirement transition affects the male retiree as well as the spouse. (We collected data on wives' retirement, an increasingly important topic; however, recruitment procedures of subjects, described below, encouraged selection of couples on the basis of husbands' retirement and, consequently, that focus in our research.) The marital relationship is arguably the most important relationship in late middle age and old age (Gilford, 1986). Being a husband or wife is a "master" role, central to identity and self-concept, which becomes even more important when other roles are lost (Ebaugh, 1988). In this paper, we will present perceptions of retirement marriage which, because marriage is not an objective "something," may be, and often are, quite different depending on the viewpoint of each partner.

METHODS

Specifically, we interviewed in-depth 92 couples in which the husband had been retired six to twelve months. Men were participants in the Normative Aging Study, a Boston-based bio-medical longitudinal study conducted by the Veterans Administration since 1961 (Ekerdt, 1987). Normative Aging Study

participants reflect the demographic composition of the Boston area: Half are white-collar and half blue-collar; they live in urban, suburban, and some rural communities, generally within 50 miles of Boston. Not all are veterans, but they were free of chronic disease when examined initially, and had a commitment to staying in the area. Participants are mainly white middle-class men who are still generally healthy and have adequate financial resources for their needs.

After determining retirement dates, we requested participation of eligible men and their wives. We would not accept one spouse if the other refused. Sixty percent of couples agreed to come for the approximately 90 minute focused interview. The response rate corresponds favorably with other face-to-face non-clinical interview studies of couples. (From comments of those who refused, we have inferred that it was hesitancy on the part of wives, who had not been involved previously in the Normative Aging Study, which accounted for non-participation. This is an unusual circumstance in couples' research, when it is generally men who refuse to reveal themselves in interviews.) We could find no demographic differences between participants and non-participants. For physical or logistic reasons, 10% of respondents required home interviews.

The average age of the men we interviewed was 62 and average age of wives was 60. One third of wives were working, half of those full-time, and half part-time. As for the husbands, 36% were working part-time, and the rest were not employed at all.

In this paper, we will describe some modal responses of husbands and wives to the transition to retirement. We have labeled these responses 1)impingement, 2)the second look, 3)the spoiled retirement, and 4)retirement as resource. The typology was developed from coding of open-ended responses to

interview items regarding activities and evaluations of the retirement experience, and from case summaries which were prepared after each interview. These modal responses are similar to ideal types but are not mutually exclusive. Spoiled retirement and retirement as resource are more global than the others, for example. We will give some idea of prevalence of these responses; their value, however, lies as sensitizing concepts which have not appeared elsewhere in the literature.

Our aim was to obtain responses grounded in the retirement experience, rather than to plumb the depth of marital satisfaction from a marital history perspective. However, as Brubaker (1985) has aptly observed, marital history has an important influence on current evaluation; past and present cannot be truly separated, as the following analysis will show.

RESULTS

The response we have called impingement was almost entirely limited to the wives. In fact, over half of them referred to some aspect of this issue. In the simplest terms, impingement refers to overlap of husbands into the wife's sphere of activity, a result of the increased amount of time husbands usually spend in the home after retirement. The majority of women saw impingements as minor nuisances or annoyances rather than as crises or catastrophes.

Both working and non-working women mentioned disruption of daily routines. For housewives, this often meant shuffling of household chore schedules that they had developed over the years, like washing on Tuesday and floors on Wednesday. Several complained about not getting as much done around the house, as they left dust on furniture to accompany husbands on an errand or day trip.

Others were distressed by criticism of their efficiency in housekeeping or husbands' housekeeping suggestions. "Help" in the kitchen sometimes made for more work when housekeeping standards of partners were not the same. Messy hobbies, newspapers and books lying around, and use of the dining room table for part-time jobs also discomforted some wives.

Working women cited delay in getting out of the house in the morning, as relaxed husbands wanted conversation. Others felt a certain amount of envy as husbands were able to sleep in, as they scurried about.

Another form of impingement was psychological. Many wives cited a lack of privacy. What had previously been a private household realm was now open to scrutiny. Husbands could overhear telephone conversations. They could monitor wives' daily routines. They were just <u>there</u>. Furthermore, it was common for wives to feel uneasy about leaving husbands at home if they went out. Wives reported that initially they felt a kind of guilt, even though it was rare for husbands to express disappointment or demand companionship. They would often return home earlier than they had anticipated or change their plans.

The majority of wives who reported these problems felt that they were no longer issues. They had been bothered for only a short time--a period of weeks or months immediately following their husband's retirement. Contrary to advice in popular how-to literature (Harbert et al., 1987), only rarely had solutions come about as a result of discussion between spouses and airing of mutual concerns. Wives usually reported that they had "gotten used to" the new situation and had adjusted unilaterally. This was especially the case with psychological impingement, when husbands were generally unaware that wives harbored those feelings. In fact, many husbands reported that they had made special efforts to avoid being "underfoot", although some confessed that they

probably were, anyway. At least in the initial phase of the retirement process, the stereotype has some validity.

As for husbands, who had formerly spent eight hours away from the home, retirement afforded a closer view of wives' daily lives, a second look which sometimes came as a surprize. Many were dismayed at their wives' humdrum routines, at what they considered the inordinate amount of time spent on housework. They felt that wives should get out of the house more, not to provide company for them, they emphasized, but for their own good. Some were the same men who criticized wives about inefficiency in housework or demanded more attention, but others reported that they had not articulated their thoughts. Many still harbored concern. On a deeper level, these men may have been venting disappointment at a lack of intellectual or emotional stimulation in the marital relationship. We had the impression that the real topic may have been a de-vitalized marriage, and disappointment that retirement had not brought about the re-vitalization that some had hoped for.

On the other hand, a few men were unhappy with their wives' hectic schedules, which often involved employment. Here again, they couched their criticism in terms of the spouse's own good, but they, also, may have been lamenting a lack of emotional or physical companionship.

Men's second look at wives' lifestyles are especially salient in view of the importance of marriage for late-life well-being among men. Among women, who have usually forged intimate relationships with friends and other family members, needs for support and self-revelation can be found in a variety of settings. Among men, however, satisfaction of need for intimacy is centered on marriage (Vinick, 1978). In putting all of their emotional eggs in one basket, men may be particularly susceptible to weakness in the straw.

Virtually every study of retirement has indicated that illness and disability are important predictors of lower satisfaction in retirement (e.g. Parnes, et al., 1985). When either spouse is impaired, there may be negative consequences for both partners. Spouses are usually primary caregivers (Cantor, 1983), so plans and expectations of both partners are likely to be considerably disrupted. Husbands and wives in our group of respondents made light of mild disabilities, and adjusted activities accordingly. But when illness made normal activities impossible or was life-threatening the result was often a spoiled retirement.

Physical and emotional problems of other family members also sometimes resulted in spoiled retirements. Retirees took to heart problems of children and grandchildren, which often became the theme of the interview. Divorce, addiction, criminal behavior, or physical or emotional disability were troubling whether or not the family member lived in the home. But when such problems resulted in children and grandchildren coming back to the parental home or occurred among those living in the home, such problems could be devastating, especially when spouses could not agree on a solution or the problem seemed intractable. What might have been a time of life characterized by relaxation and companionship was tainted by the oppresiveness of the situation. Life revolved around the problem.

Similarly, retirement was sometimes spoiled by the burden of caring for a disabled elderly parent. We were impressed by the caretaking responsibilities assumed by retired children. Many men and women were pleased to be able to extend more aid to needy parents in the form of more frequent visits, shopping, cleaning, and transportation. But sometimes the sense of burden was great, especially when a parent lived in the child's home. Then, there was often a

feeling of missed opportunity, and guilt about the effect on the spouse. Such caretakers looked forward to a time when they could assume the more carefree existence that retirement usually connotes.

Retirement as resource refers to global evaluation of retirement as a positive state. Indeed, it was the modal response of the majority of respondents. For example, 60% of men and women described the quality of life as "somewhat" or "much" better since the husband's retirement, and less than 10% described it as worse.

Husbands' assessment of retirement focused on the personal level. Declaration of pleasure at increased time with the spouse, especially in travel, was not uncommon. However, the main emphasis of men concerned the freedom to pursue individual goals and desires and to leave behind deadlines and the general tyranny of working schedules.

In contrast, women focused on the interpersonal realm. They appreciated the increase in leisure activities with husbands, and the more relaxed atmosphere in the home now that husbands were retired. Some observers have noted the "contagion" of stress and depression from one person to another (Albrecht and Adelman, 1984). Many women had apparently caught the contagion of relaxation.

It has been well established that wives appreciate increased participation by husbands in household tasks after retirement (e.g. Hill and Dorfman, 1982). We suspect that women's satisfaction owes little to an increased sense of equity and fairness in the division of labor. Rather, it is owed to a sense of companionship that women derive by sharing in a common enterprise, home maintainance (even if they do as much work as before retirement).

In conclusion, the modal responses we have described are, no doubt, not exhaustive of the patterns one could abstract from the data. They were, however, the most striking. None supports the idea of retirement as a crisis in the lives of married couples. Responses suggest that most problems of adjustment were either minor and short-lived or attributable to conditions other than retirement itself. In short, retirement neither ruins nor resurrects marriage.

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